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ABSTRACT

One of a series of 12 in the secretarial/clerical area, this booklet for the vocational instructor contains a job description for the correspondence supervisor (also known as a senior correspondence secretary/specialist, word processing supervisor, or word processing center specialist), a task list under 20 areas of competency, an occupational tasks competency record (suggested as replacement for the traditional report card), a list of industry representatives and educators involved in developing the project, and statements of competencies and a separate competency record for the area of human relations and personal development. Job duties listed for the correspondence supervisor include these: Maintain reports of personnel, costs, productivity; supervise and train correspondence specialists; maintain office procedures; assist in personnel development; and coordinate work requirements. Areas of competency in human relations and personal development are included (communication, self-development, personal appearance, office attitude, social and business etiquette, and job-seeking skills). Statements of competencies may be graded at either the secondary or postsecondary level, and the competency records are intended to follow the student through vocational training at both levels. Tasks in the task list are cross referenced with those in the booklets for other secretarial/clerical jobs. (MF)

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CE 009 580

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Correspondence Supervisor

TASK LIST
COMPETENCY RECORD

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CROSS REFERENCE SYSTEM

Task Lists in the secretarial/clerical area include: office services aid, typist, general office/typist, receptionist, secretary/non-shorthand, secretary/shorthand, educational office personnel, medical secretary, legal secretary, administrative assistant, correspondence specialist, correspondence supervisor, and data entry operator. All Task Lists contain an add-on list of human relations/personal development qualities desirable for graduates seeking secretarial/clerical positions.

The task lists for office services aid, typist, general office/typist, receptionist, secretary/non-shorthand, and secretary/shorthand are referred to as "GENERAL" secretarial/clerical lists and all additional lists are referred to as "SPECIALIZED" lists.

The * and the numbering system is the key to cross-referencing for the specialized lists. The specialized lists are compared to the lists for typist, general office/typist, receptionist, secretary/non-shorthand, and secretary/shorthand. When there is something on the specialized list that is not on the general lists a * appears. The position of the * indicates the level of change made in the AREA OF COMPETENCY, The Statement of Competency, or the Task. For example, if the * appears before the AREA OF COMPETENCY the entire AREA OF COMPETENCY is new. If the * appears before a Statement of Competency or Task then only that Statement or Task is new. If the * appears before a word then only that word is new or different. It may be necessary to refer to more than one general task list when comparing statements of competency.

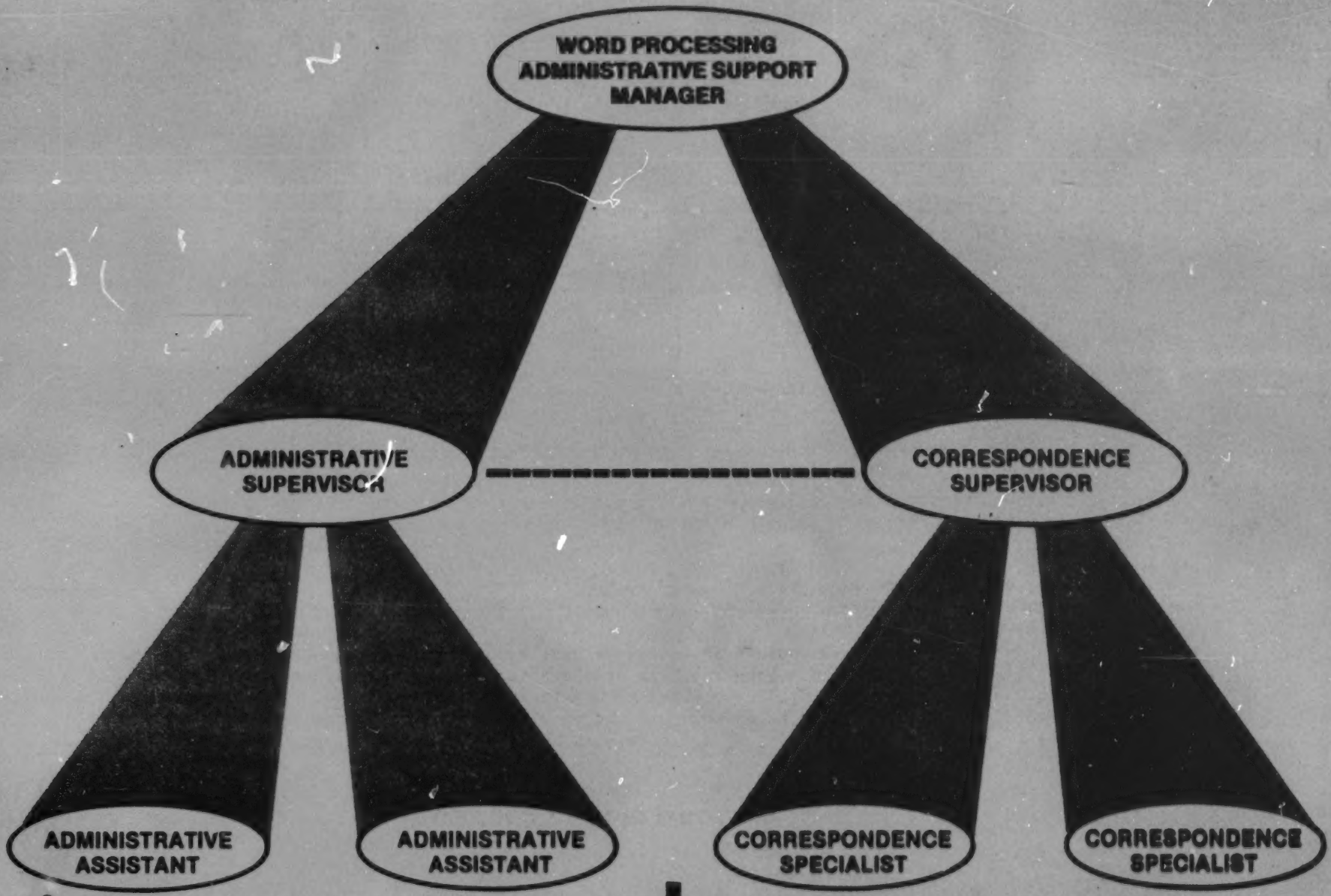
The Task List for Data Entry Operator is not referenced to the general lists because the tasks are unique in that area and need specialized training. The Task Lists for Correspondence Specialist and Correspondence Supervisor are not referenced to the general lists because tasks in these areas are applied to a word processing/correspondence center and the procedure for completing the tasks is different from the tasks in the general lists. The Task List for Correspondence Supervisor is cross-referenced as an add-on to the Correspondence Specialist Task List.

INTRODUCTION TO WORD PROCESSING

Word Processing is one of the fastest growing areas in Business and Industry. Education for this area should be considered a total word processing program and must include training for non-typing (Administrative Assistant) and training for typing (Correspondence Specialist) positions. Therefore, the task list for Word Processing Administrative Assistant and Word Processing Correspondence Specialist are presented in one booklet.

The worker mobility chart on the following page is typical of that found in a business office that has implimented the total word processing concept. This worker mobility chart identifies distinct functional areas for the Administrative Assistant and the Correspondence Specialist. Their areas are inter-dependent and permit total promotional mobility for office workers. An Administrative Assistant can move to a Correspondence Specialist position or be promoted to the Administrative Supervisor position. The Correspondence Specialist can move to the Administrative Assistant position or be promoted to the Correspondence Supervisor position. Promotion from either side leads to the Word Processing/Administrative Support Manager's position.

Worker Mobility Chart



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Administrative Support Side

Correspondence Side

10

INDUSTRY RECOMMENDATIONS

CORRESPONDENCE SUPERVISOR

Industry representatives have made several suggestions to students who will seek employment upon completion of this occupational program. These suggestions are general in nature and describe the kind of individual whom they wish to hire. A competent worker is one who satisfactorially performs the tasks listed in this document and one who is mature and responsible. It is important that an employee have a positive attitude toward work and that he/she continues to learn on the job.

One way an employee continues to learn is through reading articles in professional journals and publications. It is very important for a person in this position to intelligently communicate with employers, associates, and the general public.

The employee who is an asset to the business assumes responsibility for communications (both written and oral) that leave the office. This includes using correct grammar and punctuation, spelling words correctly, and proofreading carefully so that neat and accurate corrections are made. Accuracy and confidentiality are extremely important in all secretarial/clerical occupations.

JOB DESCRIPTION

Correspondence Supervisor

Other common job titles which graduates may have include: Senior Correspondence Secretary/ Specialist, Word Processing Supervisor, Word Processing Center Supervisor.

The basic duties of the correspondence supervisor are to maintain reports such as personnel, cost, and productivity. Other responsibilities could include supervising and training the correspondence specialist within the center, developing and maintaining center procedures, giving personnel interviews, counseling, assisting in career development and advancement, assisting in development of new applications and coordinating work requirements received from users.

In addition, the correspondence supervisor may be required to make recommendations for equipment and personnel to meet future management objectives.

Graduates of this program are qualified for employment in an office that utilizes the word processing concept. Graduates of such a program begin as a correspondence specialist but have the opportunity for more rapid advancement.

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TASK LIST

The following Task List gives you, the vocational instructor, recommendations about what your students should be able to do when they take a job as a CORRESPONDENCE SUPERVISOR. It was developed by a working committee of secretarial/clerical instructors and industry representatives throughout the state of Minnesota.

The Task List on the following pages includes the Tasks and the AREAS OF COMPETENCY recommended for a graduate of the advanced Word Processing Occupational Program.

As you utilize this task list, you will need to continue working with your local advisory committee and with other instructors in your geographic area. Judgments must be made, by you, concerning the amount of time to spend in teaching various tasks, the conditions surrounding the performance of each task and the performance level for each task that will be acceptable.

Correspondence Supervisor

TASK LIST

AREA OF COMPETENCY: TYPEWRITTEN COMMUNICATIONS

I.A. Types business documents from: transcription equipment, hard copy, stored documents

1. types business letters in several styles including any of the following features

   a. attention line
   b. carbon notations
   c. company name in closing
   d. enclosure notations
   e. listed material
   f. mailing notations
   g. multiple page headings
   h. postscripts
   i. quoted material
   j. reference initials
   k. special closing

* This list is referenced to the correspondence specialist list. The * indicates areas which apply only to the correspondence supervisor.

1. special-sized stationery

   (1) executive size
   (2) half size
   (3) legal size
   (4) metric update

m. statistical data in tabular form
n. subject line
o. document codes
p. special formats

2. types addresses on envelopes

   a. addresses for window envelopes
   b. mailing address (including ZIP Code)
   c. name above printed return address
   d. return address
   e. special notations

3. types interoffice memos

4. types manuscripts

   a. footnotes

5. types multiple page reports

I.B. Types copy for reproduction from: transcription equipment, hard copy, stored documents

1. types offset masters
2. types masters for photo reproduction
3. types photo composition input

I.C. Types miscellaneous material from: transcription equipment, hard copy, stored documents

1. types miscellaneous material

a. address, file folder and file drawer labels
b. company news letters
c. indes cards
d. itineraries
e. meeting agendas
f. name badges
g. news releases
h. postcards
i. speeches
j. statistical reports
k. summaries of minutes of meetings or conferences
l. various office forms
m. various periodical reports
n. other materials pertinent to the specific business

I.D. Types business documents and miscellaneous material from transcription equipment, hard copy, and stored documents supplying carbon copies as requested

1. types carbon copies

AREA OF COMPETENCY: LOGGING-IN

I.A. Performs logging-in procedures for work coming into the correspondence center via central recording equipment

1. removes media from recorder
2. places clean media on the recorder when necessary
3. completes log sheet and attaches media removed from central recorder

    a. records time dictation was received

4. places media and log sheet in hold folder according to centers work in progress procedures

I.B. Performs logging-in procedures for hard copy coming into the correspondence center

1. completes log sheet and attaches to hard copy

    a. records time copy was received

2. places hard copy and log sheet in hold folder according to centers work in progress procedures

I.C. Performs logging-in procedures for stored copy

1. selects needed materials from stored copy file
2. completes log sheet indicating amount of work and time of completion

AREA OF COMPETENCY: KEYBOARDING (ON MAGNETIC KEYBOARD)

I.A. Keyboards from recorded media, hard copy or stored documents and ptoduces final copy as requested by center users

1. removes recorded media, hard copy, or stored documents from central hold folder or stored document file following center procedures to obtain materials needed for keyboarding

    a. indicates time and date picked up on log sheet

2. keyboards materials obtained

    a. types copy

        (1) rough-draft form
        (2) first-time-final
        (3) documents for permanent storage

3. edits and proofreads for playback in final form

    a. punctuation
    b. spelling
    c. grammar
    d. word division
    e. format

4. plays back rough draft, edited materials in final form

5. uses line counter or specific office measuring procedure to determine amount of work typed
6. completes log sheet to indicate work completed

    a. indicates time completed
    b. classifies type of document

        (1) original
        (2) hard copy
        (3) stored document
        (4) revisions
        (5) statistical

    c. determines amount of work completed

        (1) lines
        (2) pages
        (3) keystrokes
        (4) time

7. scans, erases, refiles, or returns to user the transcribed media, hard copy, or stored documents as determined by center procedures
8. routes completed copy to word originator

I.B. Keyboards variable information when playing back stored documents

1. obtains stored document according to center procedures
2. plays back stored material and inserts variable information as needed

3. edits and proofreads for accurate final copy
4. measures work
5. completes log sheet
6. completed copy is returned to work originator for final approval

I.C. Keyboards documents using specialized terminology as determined by the needs of the business (e.g. legal, medical)

I.D. Proofreads and makes neat and accurate corrections of typed material

*AREA OF COMPETENCY: COMMUNICATIONS COMPOSITION

I.A. Composes miscellaneous business letters or memos

I.B. Composes business reports

I.C. Composes other materials unique to the business

I.D. Edits materials for processing when necessary

I.E. Composes and dictates letters, memos, etc. for transcription

1. uses a machine
2. dictates person to person

AREA OF COMPETENCY: RECORDS FILING AND MANAGEMENT (AS APPLIED TO CENTER PROCEDURES)

II.A. Maintains and manages the currently used filing system

1. adds new jackets, folders or envelopes
2. locates and retrieves stored information

   a. magnetic media
   b. hard copy

3. refiles stored media
4. searches for missing and misplaced materials
*5. maintains records of materials taken out of files
*6. follows-up on released materials

I.B. Codes documents for filing

1. assigns code numbers
2. records name of author requesting the work

I.C. Maintains index files

I.D. Maintains personal "work in progress" file

I.E. Maintains central "work in progress" file

I.F. Maintains log records

I.G. Retains completed output media for a predetermined number of days using the procedure for holding as established by the center

I.H. Maintains "tickler" file

*I.I. Revises files to keep them current

*I.J. Cross-references documents and prepares cross-reference cards

*I.K. Uses CRT file maintenance to update magnetic media

*I.L. Determines recordkeeping needs and selects a filing system

*I.M. Establishes and sets up a filing system

1. requisitions necessary equipment and supplies
2. prepares folders and guides
3. files documents

AREA OF COMPETENCY: PUBLIC RELATIONS AND STAFF SERVICES (VERY IMPORTANT)

I.A. Receives persons who enter the correspondence center

I.B. Schedules and records appointments with office personnel

I.C. Conducts tours

AREA OF COMPETENCY: OFFICE EQUIPMENT

II.A. Sets and maintains standards for maintenance and care of office equipment within the center

*I.B. Handles service calls on equipment

*I.C. Determines requirements for equipment

1. knows what equipment is available
2. makes recommendations for equipment changes

*I.D. Maintains records of equipment inventory

AREA OF COMPETENCY: OFFICE SUPPLIES (AS APPLIED TO CENTER)

II.A. Maintains and keeps up to date personal and center inventory of supplies

1. determines requirements for personal and center supplies and checks to see if minimum quantities are on hand
2. prepares requisitions or orders supplies as needed
3. organizes and maintains records of supplies inventory

*AREA OF COMPETENCY: OFFICE FUNCTIONS

I.A. Maintains a bulletin board of announcements, news, etc.

I.B. Maintains employee information directory

I.C. Writes/prints legibly

I.D. Attends inhouse staff meetings

AREA OF COMPETENCY: TELEPHONE COMMUNICATIONS

I.A. Answers incoming telephone calls

1. answers inquires posed by telephone callers
2. records telephone messages
3. delivers or routes telephone messages

II.B. Places outgoing local and long distance telephone calls

1. places local calls
2. places outgoing long distance calls

II.C. Keeps internal (center) telephone records

1. keeps list of frequently called numbers up to date
2. records long distance calls made

I.D. Looks up information by using the telephone directory

1. uses the white pages
2. uses the yellow pages

I.E. Places outgoing and receives incoming calls using specialized equipment

1. operates speakerphone
2. operates picture phone (optional)
3. uses bell-boy service (pager service)
4. uses card dialers
5. operates after hours message recorder
6. uses acoustic contacts (optional)

AREA OF COMPETENCY: ADMINISTRATIVE DUTIES

I.A. Delegates work to other people by giving instructions and directions

I.B. Receives work and instructions from company employees and assumes responsibility for its completion

I.C. Develops and improves work methods, procedures, and manuals

I.D. Plans and schedules work assignments and priorities for the correspondence center

I.E. Resolves author complaints

AREA OF COMPETENCY: REPROGRAPHIC SERVICES

I.A. Creates needed copies

1. operates duplicating equipment

    a. offset (optional)
    b. photocopier

2. collates materials

    a. manually
    b. by machine

*I.B. Determines and recommends duplicating requirements and delegates responsibility for the creation of needed copies

AREA OF COMPETENCY: REFERENCE MATERIALS

I.A. Uses general reference materials to compose, edit, aid in research, look up spelling, pronunciation, definition of terms

a. office or company's procedures manual
b. dictionary
c. telephone directory and yellow pages
d. quick reference words manual
e. thesaurus
f. ZIP Code directory
g. secretary's reference manual
h. company files
i. past records
j. word division manual
k. equipment operations manual
l. atlas/road maps

I.B. Uses specialized reference materials for understanding of operations, procedures, and utilization of a word processing system

1. uses book of authorized users

a. how their name and title should appear

2. uses central manuals of office procedures

a. secretary's manual
b. dictator's manual

3. communications manual

a. computer manual

I.C. Uses specialized manuals specific to the company

1. uses equipment manuals
2. uses training manuals
3. uses company policy manual

*AREA OF COMPETENCY: PRODUCTION AND PERFORMANCE STANDARDS

I.A. Develops and maintains records of production and performance according to center procedures and standards to measure work completed by center employees

1. determines type of work and maintains records for

a. correspondence
(1) letters
(2) memos

b. lengthy documents

(1) manuals
(2) guides
(3) legal briefs
(4) technical reports

c. statistical work
(1) tables

d. foreign language text

e. forms -- fill-in work

2. identifies mode of input

a. handwritten -- manuscript
b. typed drafts with author revisions
c. cut and paste
d. pre-recorded dictation -- stored or original

3. identifies activities within the center

a. keyboarding
(1) recording on magnetic media

b. text editing
(1) makes author changes using magnetic keyboard

c. playback
(1) automatic typing of "clean" output

d. non-typing activities
(1) proofreading

*AREA OF COMPETENCY: STAFF REQUIREMENTS AND RESPONSIBILITIES

I.A. Provides staffing to meet requirements

I.B. Selects, recruits, and trains supplemental help

I.C. Conducts personnel interviews

I.D. Gives verbal counseling

I.E. Assists in career development and advancement

I.F. Appraises employee performance and recommends salary action

I.G. Maintains and improves attitudes and standards within the correspondence center

I.H. Conducts staff/communication meetings

*AREA OF COMPETENCY: COST DISTRIBUTION PROCEDURES

I.A. Prepares a center summary report for management showing input from department/users, production, production against standards, and turn around time

I.B. Prepares records for cost/charge back to other departments

*AREA OF COMPETENCY: INSERVICE EDUCATION

I.A. Conducts author training sessions for users of the correspondence center

I.B. Conducts programs of on-going education for upgrading of center personnel

I.C. Conducts training sessions for new employees in the center

*AREA OF COMPETENCY: BUDGET RECOMMENDATIONS

I.A. Maintains records to make budget recommendations

1. Maintains records of personnel, equipment, and overhead for budget recommendations

a. input equipment
b. output equipment
c. salary
d. supplies

e. fringe benefits
f. temporary help
g. overtime
h. operating space
i. maintenance
j. equipment

AREA OF COMPETENCY: MACHINE OPERATIONS.

I.A. Operates the 10-key adding machine to perform basic office duties

I.B. Operates the electronic display calculator to perform basic office duties

I.C. Operates the electronic printing calculator to perform basic office duties

I.D. Operates the transcribing machine to perform basic office duties

I.E. Operates the automatic/power typewriter to perform basic office duties (Magnetic Keyboard)
Kind: _____

I.F. Operates central recording equipment (input equipment) to perform basic office duties
Kind: _____

I.G. Operates the envelope stripper to perform basic office duties (Optional)

I.H. Operates the continuous slitter to perform basic office duties (Optional)

I.I. Operates the telex to perform basic office duties (Optional)

AREA OF COMPETENCY: SUPERVISED WORK EXPERIENCE, OFFICE SIMULATION, STUDENT ORGANIZATIONS (OPTIONAL)

I.A. Participates in supervised work experience training (co-op, internship)

I.B. Participates in simulated office program

I.C. Participates in co-curricular student organizations

COMPETENCY RECORD

The COMPETENCY RECORD that appears in this section is suggested as a replacement for the traditional report card. It can be used to give employers, teachers, counselors, sutdents and parents information about what each student can and cannot do.

The COMPETENCY RECORD should follow the student through his or her vocational training in the secondary and/or the post-secondary school. The recommended grading scale is shown on the COMPETENCY RECORD. The COMPETENCY RECORD on the following pages includes ALL the AREAS OF COMPETENC recommended for a graduate of the Correspondence Supervis Occupational Program.

COMPETENCY RECORD

OCCUPATIONAL PROGRAM: **Correspondence Supervisor** *Name of Student* _____

This competency record tells what the student, who is named above, has demonstrated that he or she can do. A graduate is one who has demonstrated competent performance of all the tasks designated for this occupational program. This competency record is to be used as an expansion of and/or supplement to the traditional report card. Student performance can be rated at the secondary and/or post secondary level.

RATING SCALE:

5 - Performs task(s) with ability that consistently exceed(s) program minimum standards set for job entry level; very competent.

4 - Performs task(s) at job entry level; competent.

3 - Performs task(s) with periodic assistance.

2 - Performs task(s) with constant assistance.

1 - Is unable to perform task(s).

T - Demonstrated ability to perform task(s) at or above job entry level by taking a challenge test.

PWPM - Actual production words per minute (PWPM) obtained by student.

SCHOOL(S) ATTENDED: DATES ATTENDED INSTRUCTOR'S NAME(S)

_____

_____

_____

_____

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: TYPEWRITTEN COMMUNICATIONS							
I.A. Types business documents from: transcription equipment, hard copy, stored documents							
I.B. Types copy for reproduction from: transcription equipment, hard copy, stored documents							
I.C. Types miscellaneous material from: transcription equipment, hard copy, stored documents							
I.D. Types business documents and miscellaneous material from transcription equipment, hard copy, and stored documents supplying carbon copies as requested							
Comments:							
AREA OF COMPETENCY: LOGGING-IN							
I.A. Performs logging-in procedures for work coming into the correspondence center via central recording equipment							
I.B. Performs logging-in procedures for hard copy coming into the correspondence center							
I.C. Performs logging-in procedures for stored copy							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
Comments:							
AREA OF COMPETENCY: KEYBOARDING (ON MAGNETIC KEYBOARD)							
I.A. Keyboards from recorded media, hard copy or stored documents and produces final copy as requested by center users							
I.B. Keyboards variable information when playing back stored documents							
I.C. Keyboards documents using specialized terminonlogy as determined by the needs of the business (e.g. legal, medical)							
I.D. Proofreads and makes neat and accurate corrections of typed material							
Comments:							
*AREA OF COMPETENCY: COMMUNICATIONS COMPOSITION							
I.A. Composes miscellaneous business letters or memos							
I.B. Composes business reports							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.C. Composes other materials unique to the business							
I.D. Edits materials for processing when necessary							
I.E. Composes and dictates letters, memos, etc. for transcription							
Comments:							
AREA OF COMPETENCY: RECORDS FILING AND MANAGEMENT (AS APPLIED TO CENTER PROCEDURES)							
II.A. Maintains and manages the currently used filing system							
I.B. Codes documents for filing							
I.C. Maintains index files							
I.D. Maintains personal "work in progress" file							
I.E. Maintains central "work in progress" file							
I.F. Maintains log records							
I.G. Retains completed/output media for a predetermined number of days using the procedure for holding as established by the center							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.H. Maintains "tickler" file							
*I.I. Revises files to keep them current							
*I.J. Cross-references documents and prepares cross-reference cards							
*I.K. Uses CRT file maintenance to update magnetic media							
*I.L. Determines recordkeeping needs and selects a filing system							
*I.M. Establishes and sets up a filing system							
Comments:							
AREA OF COMPETENCY: PUBLIC RELATIONS AND STAFF SERVICES (VERY IMPORTANT)							
I.A. Receives persons who enter the correspondence center							
I.B. Schedules and records appointments with office personnel							
I.C. Conducts tours							
Comments:							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: OFFICE EQUIPMENT							
II.A. Sets and maintains standards for maintenance and care of office equipment within the center							
*I.B. Handles service calls on equipment							
*I.C. Determines requirements for equipment							
*I.D. Maintains records of equipment inventory							
Comments:							
AREA OF COMPETENCY: OFFICE SUPPLIES (AS APPLIED TO CENTER)							
II.A. Maintains and keeps up to date personal and center inventory of supplies							
Comments:							
*AREA OF COMPETENCY: OFFICE FUNCTIONS							
I.A. Maintains a bulletin board of announcements, news, etc.							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.B. Maintains employee information directory							
I.C. Writes/prints legibly							
I.D. Attends inhouse staff meetings							
Comments:							
AREA OF COMPETENCY: TELEPHONE COMMUNICATIONS							
I.A. Answers incoming telephone calls							
II.B. Places outgoing local and long distance telephone calls							
II.C. Keeps internal (center) telephone records							
I.D. Looks up information by using the telephone directory							
I.E. Places outgoing and receives incoming calls using specialized equipment							
Comments:							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
*AREA OF COMPETENCY: ADMINISTRATIVE DUTIES							
I.A. Delegates work to other people by giving instructions and directions							
I.B. Receives work and instructions from company employees and assumes responsibility for its completion							
I.C. Develops and improves work methods, procedures, and manuals							
I.D. Plans and schedules work assignments and priorities for the correspondence center							
I.E. Resolves author complaints							
Comments:							
AREA OF COMPETENCY: REPROGRAPHIC SERVICES							
I.A. Creates needed copies							
*I.B. Determines and recommends duplicating requirements and delegates responsibility for the creation of needed copies							
Comments:							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: REFERENCE MATERIALS							
I.A. Uses general reference materials to compose, edit, aid in research, look up spelling, pronunciation, definition of terms							
I.B. Uses specialized reference materials for understanding of operations, procedures, and utilization of a word processing system							
I.C. Uses specialized manuals specific to the company							
Comments:							
*AREA OF COMPETENCY: PRODUCTION AND PERFORMANCE STANDARDS							
I.A. Develops and maintains records of production and performance according to center procedures and standards to measure work completed by center employees							
Comments:							
*AREA OF COMPETENCY: STAFF REQUIREMENTS AND RESPONSIBILITIES							
I.A. Provides staffing to meet requirements							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.B. Selects, recruits, and trains supplemental help							
I.C. Conducts personnel interviews							
I.D. Gives verbal counseling							
I.E. Assists in career development and advancement							
I.F. Appraises employee performance and recommends salary action							
I.G. Maintains and improves attitudes and standards within the correspondence center							
I.H. Conducts staff/communication meetings							
Comments:							
*AREA OF COMPETENCY: COST DISTRIBUTION PROCEDURES							
I.A. Prepares a center summary report for management showing input from department/users, production, production against standards, and turn around time							
I.B. Prepares records for cost/charge back to other departments							
Comments:							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
*AREA OF COMPETENCY: INSERVICE EDUCATION							
I.A. Conducts author training sessions for users of the correspondence center							
I.B. Conducts programs of on-going education for up-grading of center personnel							
I.C. Conducts training sessions for new employees in the center							
Comments:							
*AREA OF COMPETENCY: BUDGET RECOMMENDATIONS							
I.A. Maintains records to make budget recommendations							
Comments:							
AREA OF COMPETENCY: MACHINE OPERATION							
I.A. Operates the 10-key adding machine to perform basic office duties							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.B. Operates the electronic display calculator to perform basic office duties							
I.C. Operates the electronic printing calculator to perform basic office duties							
I.D. Operates the transcribing machine to perform basic office duties							
I.E. Operates the automatic/power typewriter to perform basic office duties (magnetic keyboard) Kind: _____ _____							
I.F. Operates central recording equipment (input equipment) to perform basic office duties Kind: _____ _____							
I.G. Operates the envelope stripper to perform basic office duties (Optional)							
I.H. Operates the continuous slitter to perform basic office duties (Optional)							
I.I. Operates the telex to perform basic office duties (Optional)							
Comments:							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: SUPERVISED WORK EXPERIENCE, OFFICE SIMULATION, STUDENT ORGANIZATIONS (OPTIONAL)							
I.A. Participates in supervised work experience training (co-op or internship) Type of business, institution, or agency: _____ Length of time: _____							
I.B. Participates in a simulated office program Length of program: _____							
I.C. Participates in co-curricular student organizations Name of organizations: _____							
Comments:							

Statements of competencies can be graded at either the secondary or post-secondary level.

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HUMAN RELATIONS AND PERSONAL DEVELOPMENT

Secretarial/clerical personnel work with people. For this reason additional competencies in the area of Human Relations and Personal Development are needed by the student who wishes to become employed. People work together when they have an understanding of themselves and their co-workers and when they willingly make appropriate adjustments in their own behavior.

The STATEMENTS OF COMPETENCY shown in the following section of this task list represent the minimal Human Relationship and Personal Development skills needed by graduates of secretarial/clerical programs. It should be recognized that students will continue to learn about themselves and others through daily experiences they have in their careers.

HUMAN RELATIONS AND PERSONAL DEVELOPMENT

AREA OF COMPETENCY: COMMUNICATIONS

A. Demonstrates acceptance of people in a friendly business-like manner

1. interacts verbally with people in communicating a message

   a. enunciates clearly
   b. uses correct grammar and appropriate choice of words
   c. shows/demonstrates tact
   d. responds courteously
   e. uses a pleasant speaking tone, rate and volume

2. asks, remembers and uses persons' names in communicating with people

3. interacts non-verbally with people in communicating a message

   a. recognizes the meaning of facial expression
   b. recognizes the meaning of body language
   c. recognizes the meaning of eye contact
   d. recognizes the meaning of hidden messages

B. Listens to and responds to the messages received from co-workers, supervisors and visitors

1. takes notes when receiving instructions
2. periodically looks at the person who is speaking to obtain visual cues
3. asks for clarification when the message is not understood
4. concentrates on one thing at a time as directions are given

C. Gives directions and responds to other people

1. makes use of an understanding of human behavior
2. displays an ability to be assertive without being offensive
3. deals effectively with angry or defensive co-workers/customers
4. recognizes the uniqueness of and differences in individuals

AREA OF COMPETENCY: SELF-DEVELOPMENT

A. Demonstrates a disposition for continued personal growth and understanding of self

1. thinks positively about himself/herself and his/her future
2. does not show off to bolster his/her self-confidence
3. waits for what he/she wants
4. makes up his/her mind decisively
5. admits his/her shortcomings
6. recognizes and builds on his/her strengths without becoming vain
7. seeks out new ways to develop his/her talents
8. has a realistice self-image based upon the way that others see him/her
9. has a positive attitude about self and others

B. Displays personal development for social living

1. handles personal finances
2. chooses life style and housing options
   a. displays an ability to live and work with others harmoniously
3. chooses safe and reliable transportation
4. identifies personal biases, prejudices, and stereotypes

C. Shows emotional maturity

1. tolerates frustrations
2. thinks for himself/herself
3. is calm and exerts extra effort to keep on an even level
4. tackles unpleasant tasks without self-pity
5. takes responsibility for his/her own actions
6. understands his/her role in group dynamics
7. takes orders without becoming obstinate
8. is motivated by a long-range plan, not by whims or desires of each passing week
9. does not nurse grudges or try to get even

D. Maintains professional maturity

1. has clearly defined career goals

   a. views his/her job professionally, rather than as only a means of obtaining a pay check
   b. sees job satisfaction as part of good mental health
   c. sets realistic goals based on his/her abilities

AREA OF COMPETENCY: PERSONAL APPEARANCE

A. Maintains good physical fitness behavior patterns

1. gets sufficient sleep
2. shows good nutrition

3. gets proper exercise
4. has annual dental and medical check-ups
5. has good posture

B. Shows good visual poise

1. demonstrates an appropriate method of standing, walking, sitting, bending and lifting

C. Selects and wears proper office attire

1. is groomed attractively and tastefully
   a. wears clean, wrinkle free garments
   b. wears flattering colors and garment styles for his/her figure
   c. chooses accessories that are appropriate for work
      (1) fads
      (2) fashions
   d. coordinates colors of garments and accessories worn together
   e. plans a wardrobe for a limited budget
   f. wears shoes that are quiet, polished, fastened and in good repair
   g. shops for clothing that is well constructed so that it will last

D. Has good personal hygiene habits

1. bathes his/her body regularly
2. uses antiperspirant
3. has clean hair, skin, teeth, nails, and breath
4. wears clean clothes that have been laundered properly
5. removes hair properly and regularly from selected areas of the body
6. applies cosmetics in a skillful way to enhance features
7. subtly applies body fragrances

AREA OF COMPETENCY: OFFICE ATTITUDE

A. Relates to male and female co-workers of all ages, skills, backgrounds, and positions

1. contributes to a team effort
   a. requests and/or gives assistance to other people
   b. handles constructive/non-constructive criticism and profits from it
   c. declines invitations gracefully
   d. responds cheerfully and gives praise when appropriate
   e. is supportive and encouraging to co-workers

2. assumes individual job responsibility
3. deals effectively with friction and tension within the office

    a. co-workers who don't assume full share of workload
    b. moodiness of co-workers/supervisors
    c. favoritism among staff
    d. personal problems which interfere with work
    e. offensive language or behavior of co-workers, supervisor or customers
    f. improper hygiene of co-workers which is offensive to others
    g. angry customers
    h. chronic complainers
    i. short-tempered co-workers, supervisor or self

B. Supports company and employer by exhibiting professionalism

1. shows loyalty to company
2. follows the company's policies
3. maintains confidentiality of company/institutional information
4. anticipates needs of supervisor
5. demonstrates cost control

    a. conserve supplies
    b. use time efficiently
    c. develop and improve personal work methods and procedures

6. displays good housekeeping habits

    a. cleans and maintains work area
    b. cleans and organizes employer's work area as instructed
    c. makes coffee and keeps coffee area neat and clean

7. shows professional commitment to his/her employer

    a. shows flexibility and willingness to try new approaches
    b. is versatile and willing to adopt his/her behavior to new situations
    c. willingly works overtime to meet scheduled deadlines
    d. asserts his/her feeling, needs, and competence in communicating with his/her employer about salary, benefits, and company policy

C. Shows that he/she is dependable in the office situation

1. has work habits that insure work being accomplished on time and correctly
2. arrives at work on time and maintains scheduled working hours
3. plans and schedules work assignments and priorities
4. takes reasonable coffee breaks and lunch breaks
5. has a good attendance record with sick leave and personal days taken when necessary
6. pays attention to detail so that high quality work is maintained consistently
7. follows through to completion work that has been started

D. Shows initiative in gaining professional advancements

1. seeks job/self enhancement experiences

a. updates his/her skills and knowledge through formal education, in-house training, and informal communication
b. participates in professional organizations

2. selects or rejects job promotions based on opportunity, personal goals, and circumstances

a. examines alternatives and engages in career planning

(1) long term
(2) short term

AREA OF COMPETENCY: SOCIAL AND BUSINESS ETIQUETTE

A. Displays proper social etiquette

1. etiquette for social functions (e.g. introductions, table manners, common courtesy)

B. Displays proper business etiquette

1. converses with co-workers and guests in a socially acceptable manner, within the time constraint of the office situation

a. office business (non-confidential)
b. personal business
c. social events
d. topics of general interest

2. uses the informal communications network (grapevine) within the office in a positive way

3. refrains from contibuting to office gossip

4. addresses superior properly (e.g. Mr., Dr., Ms., etc.)

   a. formal
   b. non-formal

AREA OF COMPETENCY: JOB SEEKING SKILLS

A. Identifies job opportunities for which he/she is qualified

   1. checks school bulletin board
   2. reads newspaper ads
   3. contacts employment agencies

      a. state
      b. private

   4. uses personal contacts

B. Prepares for job interview

   1. writes and types a resume
   2. composes and types a letter of application
   3. contacts a prospective employer
   4. arrives on time
   5. conveys an optimistic outlook and willingness to learn

C. Participates in a job interview

   1. dresses and grooms himself/herself appropriately
   2. obtains job information from perspective employer

      a. job requirements
      b. benefits
      c. environment
      d. salary
      e. opportunity for advancement
      f. company's purpose and function

D. Follows-up on the job interview

   1. sends an acknowledgment letter
   2. makes a phone call

COMPETENCY RECORD

HUMAN RELATIONS AND PERSONAL DEVELOPMENT

OCCUPATIONAL PROGRAM: CORRESPONDENCE SUPERVISOR

Name of Student _____

This competency record tells what the student, who is named above, has demonstrated that he or she can do. A graduate is one who has demonstrated competent performance of all the tasks designated for this occupational program. This competency record is to be used as an expansion of and/or supplement to the tradirional report card. Student performance can be rated at the secondary and/or post secondary level.

RATING SCALE:

5 - Performs task(s) with ability that consistently exceed(s) program minimum standards set for job entry level; very competent.

4 - Performs task(s) at job entry level; competent.

3 - Performs task(s) with periodic assistance.

2 - Performs task(s) with constant assistance.

1 - Is unable to perform task(s).

T - Demonstrated ability to perform task(s) at or above job entry level by taking a challenge test.

PWPM - Actual production words per minute (PWPM) obtained by student.

SCHOOL(S) ATTENDED:	DATES ATTENDED	INSTRUCTOR'S NAME(S)

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: COMMUNICATIONS							
A. Demonstrates acceptance of people in a friendly-business-like manner							
B. Listens to and responds to the messages received from co-workers, supervisors and visitors							
C. Gives directions and responds to other people.							
Comments:							
AREA OF COMPETENCY: SELF-DEVELOPMENT							
A. Demonstrates a disposition for continued personal growth and understanding of self							
B. Displays personal development for social living							
C. Shows emotional maturity							
D. Maintains professional maturity							
Comments:							
AREA OF COMPETENCY: PERSONAL APPEARANCE							
A. Maintains good physical fitness behavior patterns							
B. Shows good visual poise							
C. Selects and wears proper office attire							
D. Has good personal hygiene habits							

	MINIMUM PROGRAM STANDARD	SECONDARY RATING	SECONDARY YR.	SECONDARY INSTR.	POST SECONDARY RATING	POST SECONDARY YR.	POST SECONDARY INSTR.
Comments:							
AREA OF COMPETENCY: OFFICE ATTITUDE							
A. Relates to male and female co-workers of all ages, skills, backgrounds, and positions							
B. Supports company and employer by exhibiting professionalism							
C. Shows that he/she is dependable in the office situation							
D. Shows initiative in gaining professional advancements							
Comments:							
AREA OF COMPETENCY: SOCIAL AND BUSINESS ETIQUETTE							
A. Displays proper social etiquette							
B. Displays proper business etiquette							
Comments:							
AREA OF COMPETENCY: JOB SEEKING SKILLS							
A. Identifies job opportunities for which he/she is qualified							
B. Prepares for job interview							
C. Participates in a job interview							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
D. Follows-up on the job interview							
Comments:							

Statements of competencies can be graded at either the secondary or post-secondary level.

CE 009 580

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